Job Aid:

How to Create a Release Requisition and Purchase Order (Contract Purchase)

**This Job Aid shows how to:**

- Create a Release Requisition in COMMBUYS
- Submit the Requisition for approval in COMMBUYS
- Send the Vendor a Release Purchase Order

Of Special Note:

Requisitions are documents used to request goods and services; they are the first document you use to generate a Purchase Order. This job aid will show how to submit a request for goods and services from Statewide Contract (SWC) and Department Contracts. Once the requisition is approved a purchase order is generated and can be sent to the vendor.
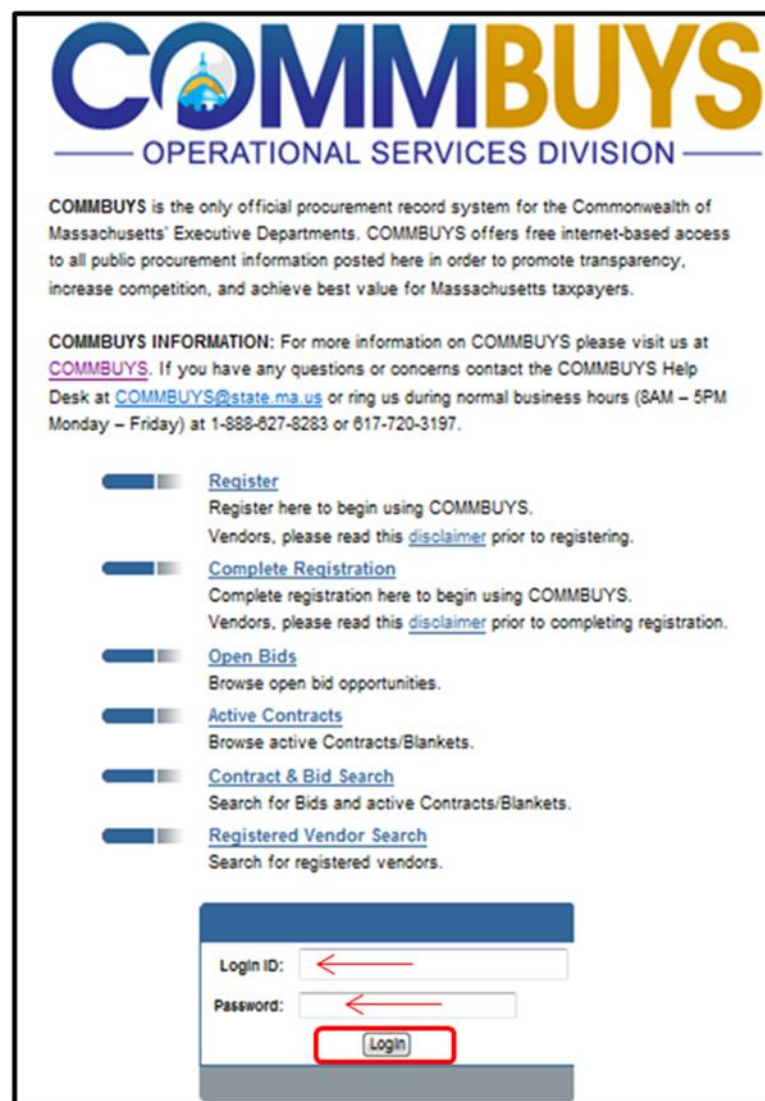
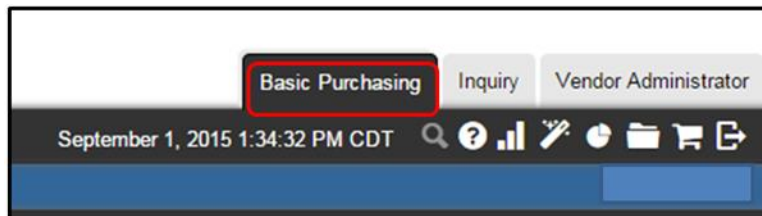| Screenshot	Directions
	Step 1: Launch the COMMBUYS Web site by entering the URL https://www.commbuys.com/bso/ in the Browser. Enter your login credentials and click the **Login** button on the COMMBUYS home page.

Job Aid:

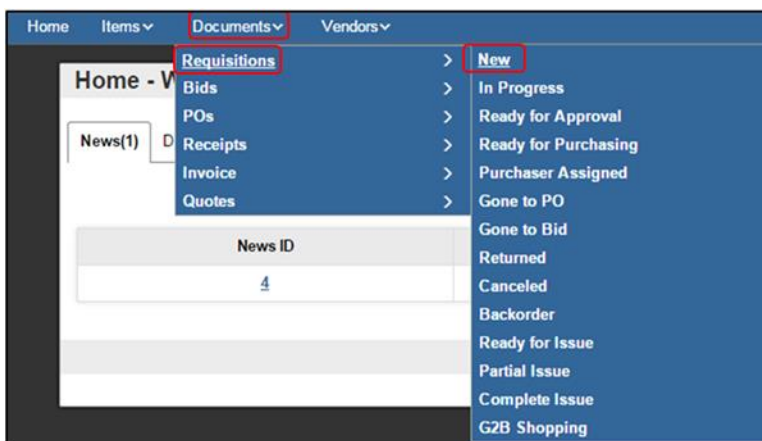## How to Create a Release Requisition and Purchase Order (Contract Purchase)

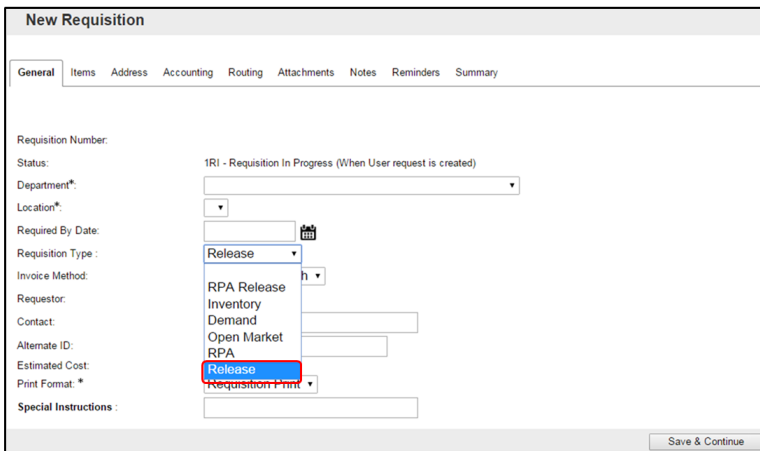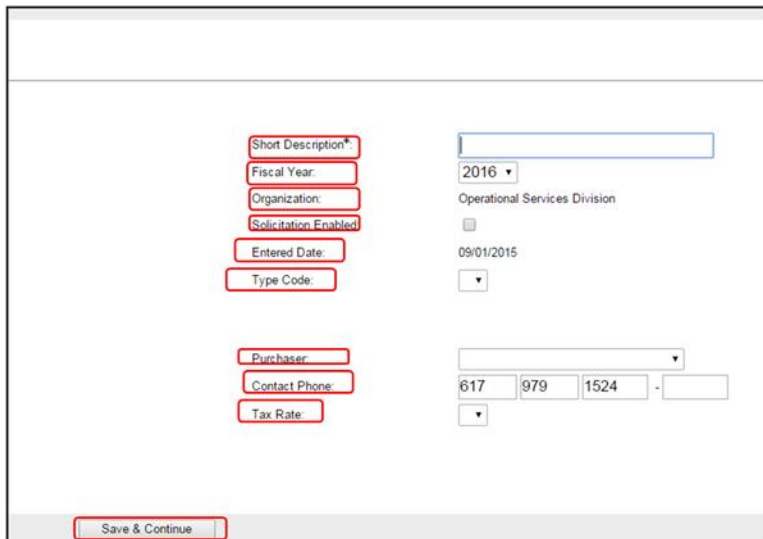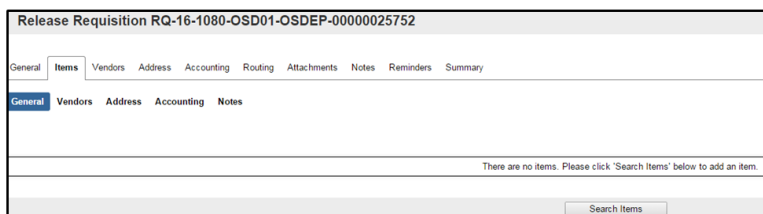| Screenshot	Directions
	Step 2: Upon successful Login, if you have multiple roles in COMMBUYS, select the **Basic Purchasing** or **Department Access** role on the upper right side of the page, if not already selected.
	Step 3: From the Navigation Bar, select **Documents > Requisitions > New**
	Step 4: The General tab for the requisition opens. On the left side of the screen, complete the following fields: • **Department**: defaults from user profile. May be changed, using the dropdown if other departments are available to user. • **Location**: defaults from user profile. May be changed, using the dropdown if other locations are available to user. • **Required by Date**: optional • **Requisition Type**: Open Market • **Requester**: user that created the requisition; this field cannot be edited • **Contact**: contact for this requisition; can be changed • **Estimated Cost**: calculated by COMMBUYS; not editable by user • **Special Instructions**: Open field to enter in specific instruction.

| Screenshot	Directions
	Step 5: The right half of the **General** tab, complete the following fields: (*) are required fields. • **Short Description***: be specific as this field can also be used as search criteria to locate a requisition – can be used as a place for your Department doc number • **Fiscal Year**: defaults to the current Fiscal Year • **Organization**: default value based on your user profile • **Solicitation Enabled**: select if this requisition will convert to a bid (request quotes from Contract vendors) • **Entered Date**: defaults to the current date • **Type Code**: select the most appropriate option from the drop down list • **Purchaser**: defaults to users' name; use the dropdown to select a different purchaser • **Contact Phone**: defaults to user's profile value; can be updated as needed • **Tax Rate**: N/A for Commonwealth, leave blank. Click the **Save & Continue** button to save the information entered on the General tab.
	Step 6: To add items to the requisition, click on the **Items** tab. Click the **Search Items** button to begin the process of adding contract goods or services to the requisition.

Screenshot	Directions
Release Requisition RQ-16-1080-OSD01-OSDEP-00000025752 - Search Items Search Using: [_____] [Find It] Advanced Search ⊟ ← Search Using: ALL of the criteria ▾ Search Fields: Contract/PO # [_____] Description [pen] Item Description [_____] Vendor Name [_____] Catalog [▾] Item Type [▾] U N S P S C Segment-Family [_____ ▾] U N S P S C Class [▾] Commodity-EPP [_____] 🔍 Cooperative Purchasing ☐ Favorites ☐ Result Type: Item ▾ ☐ Show Orderable Only [Find It] [Clear] [Add to Req & Exit] [Cancel & Exit]	**Step 7:** The item lookup or Search Items page opens. Input the search criteria and click **Find It.** **Or** click **plus (+)** sign next to Advanced Search to open more search fields. Enter search criteria and click **Find It** to reveal search results**.**
Release Results Release Search By: Any Price • Up to $2 (9) • $2 - $5 (1) Any Vendor • Bob Barker Co., Inc. (1) • Chram-Tex (1) • Garelick Farms (1) • Mathematica Policy Research Inc. (1) • Office Essentials (4) Show more 	Select	Quantity	Minimum Order Quantity	Item Description	Unit Cost	UOM	Vendor Name
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☐	0	0	Ballpoint pens, medium, blue ink	$1.00	EA - Each	Office Essentials
☐	0	0	Ballpoint pens, medium, black ink	$1.00	EA - Each	Office Essentials
☐	0	0	Ballpoint pens, fine, blue ink	$1.25	EA - Each	Office Essentials
☐	0	0	Ballpoint pens, fine, black ink	$1.25	EA - Each	Office Essentials
☐	0	0	Rollerball pens	$3.12		Pets R Us
☐	0	0	Instructions for bidders - Rules 1) Calendar Rule Type: An additional opportunity to respond may be offered during ...	$0.00		Garelick Farms | [Add to Req & Exit] [Cancel & Exit]	**Step 8:** The search results display showing unit cost, UOM, vendor, etc. for each item. Check the **Select box** of the desired item. Enter a number in the quantity field and click the **Add to Req & Exit** button located at the bottom of the page. The search process is the same for a service, although some SWC & Departmental Contracts will have **conversion vendor** under vendor name.

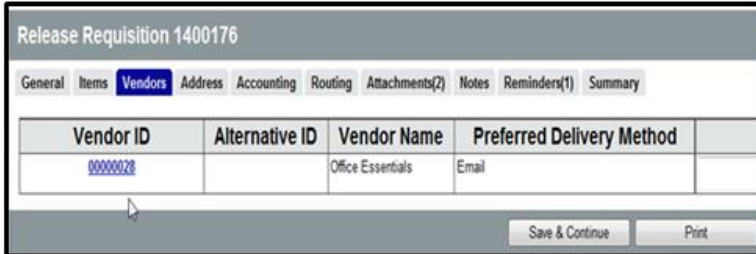| Screenshot	Directions
	Step 9: The Items tab refreshes with the selected items added to the requisition. You can click on the **item # (number)** (left side of page) to view additional details **NOTE:** The master blanket number of the selected item(s) is located also included. (this is the COMMBUYS Contract number)
	Step 10: Item detail opens. This is where you have the option to edit the **Description Field.** **Note:** Important for some contracts where you need to explain item/service detail **Note**: Items/services with a $0 unit cost can be edited to enter a correct cost and item description. Follow instructions on the Master Blanket in COMMBUYS to obtain item and pricing data.

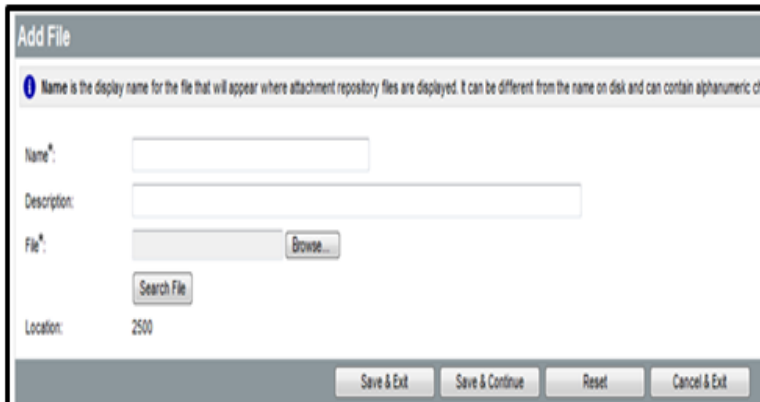| Screenshot	Directions
	Step 11: Click the Vendor tab. The **Vendor** tab contains information about the vendor that will receive the purchase order and deliver the items. This information is auto populated based on the items/services selected.
	Step 12: Click the **Address** tab. The **Address** tab opens. Displayed here is the left side of the page where the Ship-to Address is located. As long as the ship to address is present at the header level and all items are going to the same ship-to address, the ship-to address does not need to be on each individual requisition line item.
	Step 13: Click the **Attachments** tab. The **Attachments** tab displays. If any files auto-attach: review, keep or delete as necessary. Attachments include bid attachments and required forms/contract documents Click the **Add File** button to add a new file. **Note:** Add Form is not currently a working function in COMMBUYS
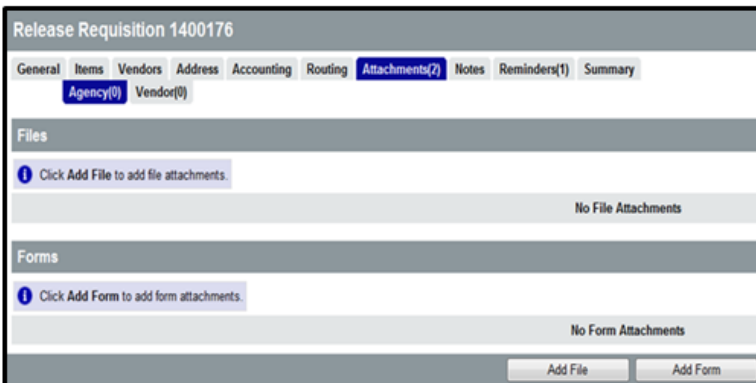
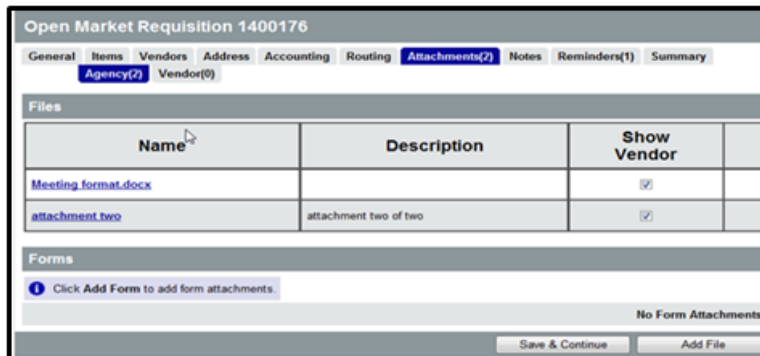| Screenshot	Directions
	Step 14: The **Add File** window opens. To select a file from your desktop, click the **Browse** button. This will search for documents from your computer. Select the desired file. Complete the following fields • **Name** – required; but will be populated with the selected file name if left blank • **Description** – optional Click **Save & Continue** to add another file or click **Save & Exit** when all files have been added. **Note:** Files previously uploaded or added to the Document Library in COMMBUYS are available in the Attachment Repository. To locate and attach from the Repository, click the **Search File** button and complete the advanced search criteria. For additional information on adding attachments refer to the job aid **How to Search for and Use Attachments in COMMBUYS.**
	Step 15: The **Attachment** tab redisplays with a list of attached files. *You can opt to disallow the vendor to view the attachments by unchecking the **Show Vendor** box.

Screenshot	Directions
	Step 16: Click the **Summary Tab** to view a summary of the nearly completed requisition. **NOTE:** Picture is split for ease of viewing Other/optional tabs: • **Accounting Tab:** Phase II • **Routing Tab:** auto-populated, after approval, based on approval workflow • **Notes Tab:** optional • **Reminders Tab:** optional
	Step 17: Shown here is the lower part of the **Summary** tab that provides a summary of each item on the requisition as well as the action buttons currently available for the requisition. Submit for Approval • Cancel Requisition • Clone Requisition • Print Review the Summary page information. Click the **Submit for Approval** button to submit the requisition into workflow for approval. **NOTE:** Picture is split for ease of viewing
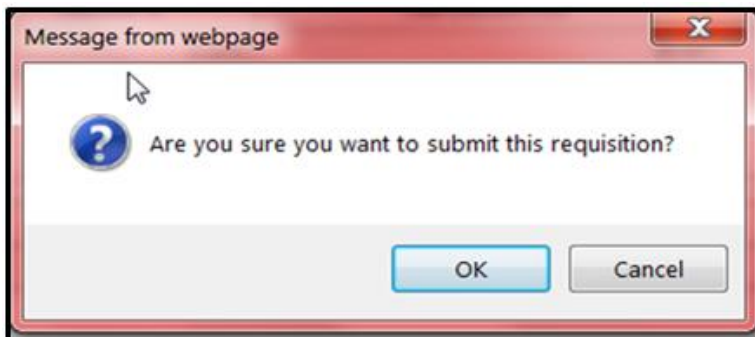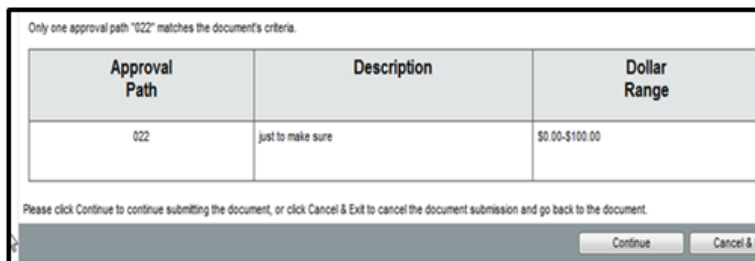
Screenshot	Directions
	Step 18: A popup message displays asking 'Are you sure you want to submit this requisition?' Click **OK** to continue with the submission. To cancel the submission, click **Cancel**.
	Step 19: The approval path for the requisition displays. It provides information about the approval path such as description, dollar range, user, the approval level and the approval type. Click **Continue** to complete submission.
	Step 20: The requisition Summary tab redisplays. The status has been updated to: • Status 1RRA – Ready for Approval **Note: For Department Access and some Basic Purchasing users the process ends at this step, the submission of the release requisition into workflow for approval. This will depend upon your agency / department purchasing workflow approval process.**
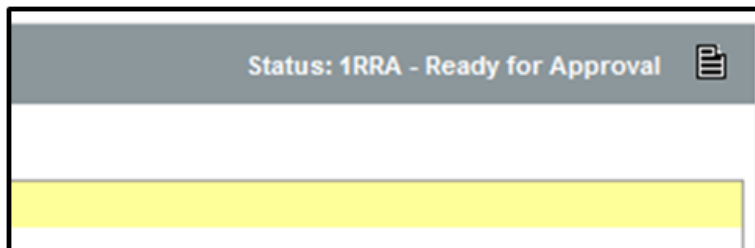
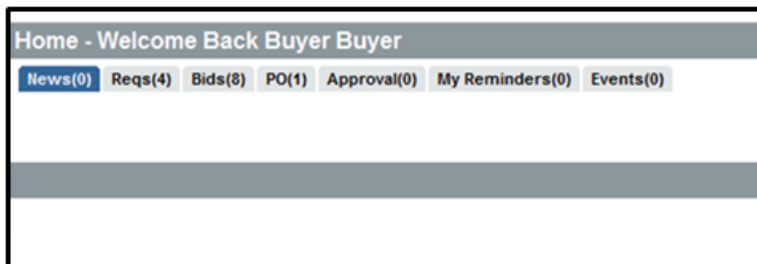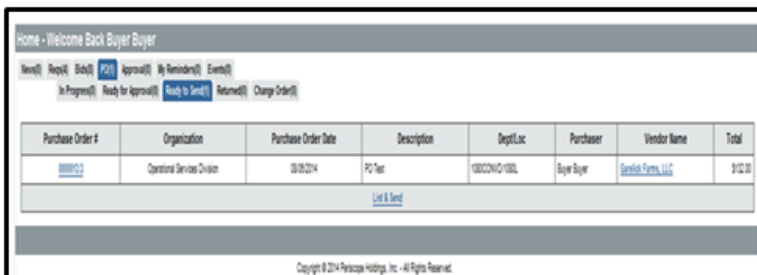| Screenshot	Directions
Home - Welcome Back Buyer Buyer News(0) Reqs(4) Bids(8) PO(1) Approval(0) My Reminders(0) Events(0)	**Step 21:** Depending on your agency's COMMBUYS workflow and your COMMBUYS user role, once the requisition has been approved you are able to find the generated Purchase Order (PO) and send the PO to the Vendor. From your **Control Center** click on the **PO** tab.
Home - Welcome Back Buyer Buyer News(0) Reqs(4) Bids(8) PO(1) Approval(0) My Reminders(0) Events(0) In Progress(0) Ready for Approval(0) Ready to Send(1) Returned(0) Change Order(0) 	Purchase Order #	Organization	Purchase Order Date	Description	Dept/Loc	Purchaser	Vendor Name	Total
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	Operational Services Division	03/06/2014	PO Test	100COMO/100L	Buyer Buyer	Garwick Farms, LLC	$132.00 | List & Send Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	**Step 22:** Click on **Ready to Send**, which is a sub tab of PO. You will see all the purchase orders you as a user have in Ready to Send status. A new COMMBUYS number was created for the Purchase Order so review the Description and Vendor name then click on the correct **Purchase Order #.**
Vendor Notification Actions Option(s) ⦿ Send Email and Notify Vendor ◯ Set to Printed Status Save & Continue Print Print Vendor Copy	**Step 23:** The PO opens to the **Summary tab**; review all information for accuracy. Scroll down to the bottom of the page and select one of the options: • Send Email and Notify Vendor • Set to Printed Status (still posts purchase order on COMMBUYS but does not send any vendor emails) Click **Save and Continue** to finalize the PO and place the order.